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28 July 1961

VIA : Director of Training  
Chief, Headquarters Training  
Chief, Operations School  
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Seminar on Liaison Operations

1. A special Seminar on Liaison Operations was held in L Building from 26 through 29 June under the auspices of the FI Staff. The schedule and list of participants are appended as Annexes I and II. The last day of the seminar, 29 June, was reserved primarily for a discussion of the training aspects of the seminar.

2. A main motivating factor for this seminar was to bring about closer staff support of the Clandestine Services Liaison Operations course (CSLO) and to attempt to "reach conclusions as to what categories of officers need training and to identify principal problems of liaison which should be emphasized in training." In other words, it was desired to obtain, for the first time, a clearer indication from the operating divisions of their needs and requirements in the field of liaison operations plus their suggestions for the implementation of these requirements in training. It was agreed between the writer, as the representative of OTR, and the FI Staff that the seminar would be timely since it would follow the task force study of liaison operations recently made by Mr. [REDACTED]. If the initial emphasis of the seminar were operational, it would thus provide "doctrine" of value to the Clandestine Services (CS) and to OTR.

3. It is not the purpose of this paper to go into the details of the general agreements and recommendations reached in the seminar concerning basic principles of liaison operations. This body of "doctrine," if fully accepted by the divisions and formalized within the DD/P, is being worked out by the FI Staff and will, of course, form an important basis for a revision of the CSLO along the lines indicated below. The writer has at all times worked closely with Mr. [REDACTED] of the FI Staff in the preparations for, and execution of, the seminar and has been working closely with Mr. [REDACTED] all along in the preparation of the basic principles paper being drawn up by the FI Staff. This is a matter of continuous coordination. The present paper will summarize briefly the training aspects of the seminar of interest to the DTR together with certain recommendations.

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4. One of the most striking results of the seminar was the very evident disparity of views between the divisions on almost all aspects of training and of operations as well. The wide differences of approach from one division to another clearly ruled out any pat book solution to the problems discussed. In terms of training for liaison officers within the DD/P, WH felt ("How can you teach empathy?") that it had no need for a training course for its liaison officers, while HM, WE and HE felt that such a course was necessary, if only to make the officer aware of certain problems, pitfalls, "warning flags" and possible solutions which had been successfully or unsuccessfully applied elsewhere. With the exception of WH, all the divisions and staffs felt a training course in liaison operations to be useful and necessary though with varying degrees of emphasis. In the course of this discussion, the pros and cons of setting up a specialist corps of liaison officers within the DD/P was the subject of a lively discussion but little over-all agreement. The main points which were generally agreed upon were the need for far less extensive exposure of DD/P officers to foreign liaison services than in the past and the inescapable fact that a good liaison officer must be basically a trained and experienced operations officer with a very high degree of expertise in all aspects of agency operations to be successful. He must be an all-around expert if he is to exploit the liaison properly and if DD/P exposure is to be limited to fewer personnel. This, clearly, requires extensive training as well as extensive experience.

5. The above generally agreed-upon factors brought the discussion to administrative matters, such as the amount of time available for training. WH said it could not afford to take so much time to train its officers for specific liaison assignments, whereas HE said it was essential to make arrangements to provide sufficient time. By and large, the entire seminar was of the opinion that the present system of assigning DD/P officers to the Operations School for training was haphazard, unplanned and poor, resulting in the wrong people being permitted to take certain courses and others prevented therefrom. In other words, who was allowed to take what course continues to be a matter of administrative expediency within the DD/P rather than being determined by the operational needs of the CS as a framework for planning and careful training of specific officers with specific or even general assignments in view. This shortcoming was held particularly applicable to the CSLO and the students sent to the CSLO. The HE representative, who attended the last running of the CSLO, emphasized this on the basis of the small percentage in his class who were going to have anything to do with liaison operations as opposed to the others attending the course for a variety of less compelling reasons. He further emphasized it was essential to be careful, in assessing the present CSLO (see below), to bear in mind that the divisions were not foresighted or fair since they sent to the course the wrong type of students.

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6. As noted above, one of the main reasons for the seminar was to induce the divisions to outline their requirements for the CSLO. In the past they had been less than clear or explicit in this respect, and many divisions had given no indication of their desires in this field of OTR instruction. In a positive sense this continued to be true in this seminar. However, this was not unexpected, and the writer invited the division representatives who attended the last running of the CSLO to be as outspoken and critical as they wished and to discuss frankly their opinions of its shortcomings and what they would like to see in its place. Since the positive "homework" of the divisions had not been carefully or thoughtfully prepared in most cases, and since it is usually easier to tear down than to build, this "negative" method at least had the advantage of obtaining some reaction and thereby giving some indication of divisional desires with respect to the CSLO.

7. As expected there was disagreement with regard to the shortcomings of the CSLO. One division felt there was entirely too much detailed run-down of a large number of foreign intelligence services. In essence, this meant that 2/3rds of the course was a reiteration of Section 56 of NIS, and the student's need-to-know for this type of detailed run-down was questioned. This division's representative thought the course should concentrate more heavily on the subject topics of the seminar (Local Liaison with 3rd Country Services, Agreements and Exchange, CIA exposure, Aid to Liaison, Joint Operations, Penetrations) as basic principles with explanations as to what these basics are and why we do it. Several others concurred broadly with this viewpoint and the need to spring loose from the divisions sufficient up-to-date operational cases to illustrate the principles involved. Another division, however, stated it felt it was difficult to teach general principles in a vacuum or an isolated form; it preferred the case-book technique. Hence, the division's experience in liaison operations over the years would be presented first, and then the principles could be drawn therefrom. Since each service was different, principles would have to be applied in different ways in different divisions. The problem was more a matter of understanding the differences and of constant evaluation. Another division, AF, presented very special problems such as: How does one set up and reorganize a new or recent intelligence service when requested by a newly independent state? What organizational boxes should be drawn for them? How should they be advised to proceed? Can a small one or two-man station become involved in such matters? Should it? "Bully-to-bully" liaison may be effective and necessary with a sophisticated service in Western Europe, but how can it be done with the [REDACTED] k1A6a For AF, the CSLO was too US-oriented and did not provide sufficient answers for its own admittedly special and parochial problems. Another criticism which naturally evolved from this was the feeling that portions of the course were too basic for senior officers, leading to a discussion about the desirability of re-organizing the CSLO into two phases: the first, a broad, general familiarization-type course; and the second, a more advanced operational seminar for senior personnel. This, it was asserted, would obviate the necessity of mixing GS-7's and GS-15's

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in the same course. While this suggestion was received with favor by a number of participants, it was finally agreed that it was currently unfeasible for two reasons:

- a. the insufficient demand for the course
- b. the lack of any cogent planning system of assigning students to the course as outlined in paragraph 5 above.

Until these points were solved or improved upon, there could be no alternative to one course, as broad as possible in an effort to meet the operational needs of the divisions, different though they are. Such a course clearly would not be able, any more in the future than in the past, to meet and satisfy the needs of all students of all divisions of whatever rank or experience.

#### CONCLUSIONS

8. No clearly defined conclusions were reached on the requirements of the divisions in training in liaison operations. The present course was deemed good and effective by some and defended accordingly. However, certain broad general opinions did evolve in the case of the majority of those attending the seminar. As indicated earlier, it was generally accepted that training in liaison operations was necessary and should continue. Also, it was the majority feeling that the course would profit operationally by a fairly drastic pruning of the portion (Section IV) reserved to a run-down of services around the world and CIA relationships with these services. The prevailing opinion lay with those who felt that the course should concentrate primarily on the basic topics of liaison operations as discussed in the seminar with supporting illustrative materials and examples from a few services rather than an across-the-board review of many services. The emphasis must be, even more than it is, on the problems involved in these liaison relationships and the lessons learned from them. All agreed that the organization of such a course would be far from easy, would require much time and digging and a major effort on the part of the divisions to provide realistically and in sufficient detail the case material which would clearly be necessary for such a revision.

#### RECOMMENDATIONS

9. On the basis of the above, the writer makes the following broad tentative recommendations with regard to the content of the CSLO. These recommendations will, of course, have to be worked out later in greater detail in terms of the actual revised schedule of the CSLO:

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a. Part IV of the CSLO be modified to remove most of the services covered. Only a few services will be covered in this shortened section, each one, however, in greater detail than is currently done. These services will represent: a so-called established, sophisticated Western European Service, a vacillating-type service (i.e., [REDACTED] etc.); a nascent-type service such as [REDACTED]. These services will be handled in detail as examples of prototypes, and detailed background and material should be made available for case studies (and possibly problems) dealing with the why's, wherefore's and problems of working with them.

b. Part III (Tools and Means) will be further expanded to deal with subject headings such as aid, visits, training, penetration, exchange, etc. in terms of the general principles already contained in this section and further expanded by the enunciated principles generally accepted in the seminar and by the divisions. Illustrative examples must support this section in detail and must be provided by, or released by, the divisions.

c. That the CSLO incorporate ways, means and standards of evaluating liaison relationships and operations on a regular basis including CI and CA evaluations. This has not previously been worked out in the DD/P, but is clearly needed. It is believed a new seminar under the auspices of the FI Staff could profitably be run with this objective in view. The writer believes the staff will wish to run such a seminar and be glad to have his assistance in doing so and in helping to evolve appropriate methods of evaluation. Its results would be incorporated into the CSLO.

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**Attachments:**

- I - Liaison Seminar Schedule
- II - Liaison Seminar Representatives

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